A CRM APPLICATION FOR WHOLESALE RICE MILL

The Rice Mill CRM Application is a comprehensive solution designed to streamline and simplify how much rice per day,how many were sold that rice and which type of rice all reports send to owners daily wise. It leverages the power of customer relationship management (CRM) to enhance customer experiences, optimize store operations, and improve overall efficiency in the rice mill factory. This project aims to develop a user-friendly and feature-rich application that addresses the specific needs of a rice mill factory.

What you'll learn

1. Real Time Salesforce Project
2. Object & Relationship in Salesforce
3. Formula fields and Validation rules.
4. Cross object formula fields.
5. Page layouts.
6. Rollup summary fields.
7. Reports and dashboards

Creating Developer Account

Creating a developer org in salesforce.

1. Go to https://developer.salesforce.com/signup and fill all details and verify the account from your mail.

Create Supplier Object

To create an object:

1. From the setup page >> Click on Object Manager>> Click on Create>>Click on Custom Object.

2.Enter the label name>>supplier

Plural label name>>supplier

Enter Record Name Label and Format

- Record Name >> supplier Name
- Data Type>>Text

3.Click on Allow reports and Track Field History and allow search

4.Allow search >> Save

Create Rice mill Object

To create an object:

1. From the setup page >> Click on Object Manager>>Click on Create >> Click on Custom Object.
2. Next,continur the above steps.

Create consumer Objects

1. Use these display format for the consumer

- label name >> consumer

Create rice details Objects

1. Use these display format for the rice details

- label name >> rice details.

Creating a Custom Tab

To create a Tab:(supplier)

1. Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)

Creating Remaining Tabs

1. Now create the Tabs for the remaining Objects, they are “ rice mill, consumer , rice details”.
2. Next,continur the above steps.

Create a Lightning App

To create a lightning app page:

1. Go to setup page >> search “app manager” in quick find >> select “app manager” >> click on New lightning App.

Creating the number field in rice details object

1. Go to the setup page >> click on object manager >> From drop down click edit for rice details object.

Creating Junction Object

A Junction object is a custom object that serves as a bridge between two related objects in a many-to-many relationship. It allows you to create a relationship between records of two different objects by creating a many-to-many relationship model.

Creating a Master-Detail Relationship

master-detail relationship is a type of relationship between two objects where the master object controls certain behaviors and settings of the detail object. Here are a few use cases that demonstrate the use of master-detail relationships.

Creating the Roll-up Summary

A rollup summary field is a field that summarizes data from a child object to a parent object that shares a master-detail relationship. Rollup summary fields can use the COUNT, SUM, MIN, and MAX functions. For example, you could use a rollup summary field to display the total value (amount of rice supplied) from rice details on a related supplier.

Creating Fields in Objects

Creating the number field in rice details object

1. Go to the setup page >> click on object manager >> From drop down click edit for rice details object.

Creating Fields in rice mill Objects

1. Select Data type as “Number” and click Next.

Creating the validation rule

Improve the quality of your data using validation rules. Validation rules verify that the data a user enters in a record meets the standards you specify before the user can save the record.

creating the page layout

To Create a Page layout:

1. Go to Setup >> Click on Object Manager >>Search for the object (consumer) >> From drop down select the object and click on it.
2. Click on Page layout >> Click on New.

owner Profile .

To create a new profile:

1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Standard User) >>enter profile name (owner) >> Save.

employer Profile

1. Go to setup >> type profiles in quick find box >>click on profiles >> clone the desired profile (Standard Platform User) >> enter profile name (employer) >> Save.

worker Profile

1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Standard Platform User) >> enter profile name (worker) >> Save.

Creating owner Role

Creating owner Role:

1. Go to quick find >> Search for Roles >> click on set up roles.
2. Go to quick find >> Search for Roles >> click on set up roles.

Creating employer roles

Creating another two roles under manager

1. Go to quick find >>Search for Roles >>click on set up roles.
2. Click plus on CEO role, and click add role under owner.

Create User

1. Go to setup >> type users in quick find box >> select users >> click New user.

creating another users

1. Go to setup ? type users in quick find box ? select users ? click New user.

Create Another User

1. Go to setup ? type users in quick find box ? select users ? click New user.

Creating OWD setting.

1. Go to setup >> type “sharing settings ” in quick search >> Click edit.

Create Report

Note : Before creating a report, create the latest “10” records in consumer objects.

Try to fill every field in each record for better experience.

1. Go to the app >>click on the reports tab
2. Click New Report.

Sharing report to owner

1. Click edit drop down and select subscribe option

create a report folder

1. Click on the app launcher and search for reports.
2. Double click on the report, “ reports tab” will be auto populated in the navigation bar.

Create Dashboard Folder

1. Click on the app launcher and search for the dashboard.
2. Click on the dashboard tab.

Create Dashboard

1. Go to the app >> click on the Dashboards tabs.

Creating an Apex Class(ConsumerRecord)

1. Login to the Salesforce account and navigate to the gear account in the top right corner.
2. Then we can see the Developer console. Click on the developer console and you will navigate to a new console window.

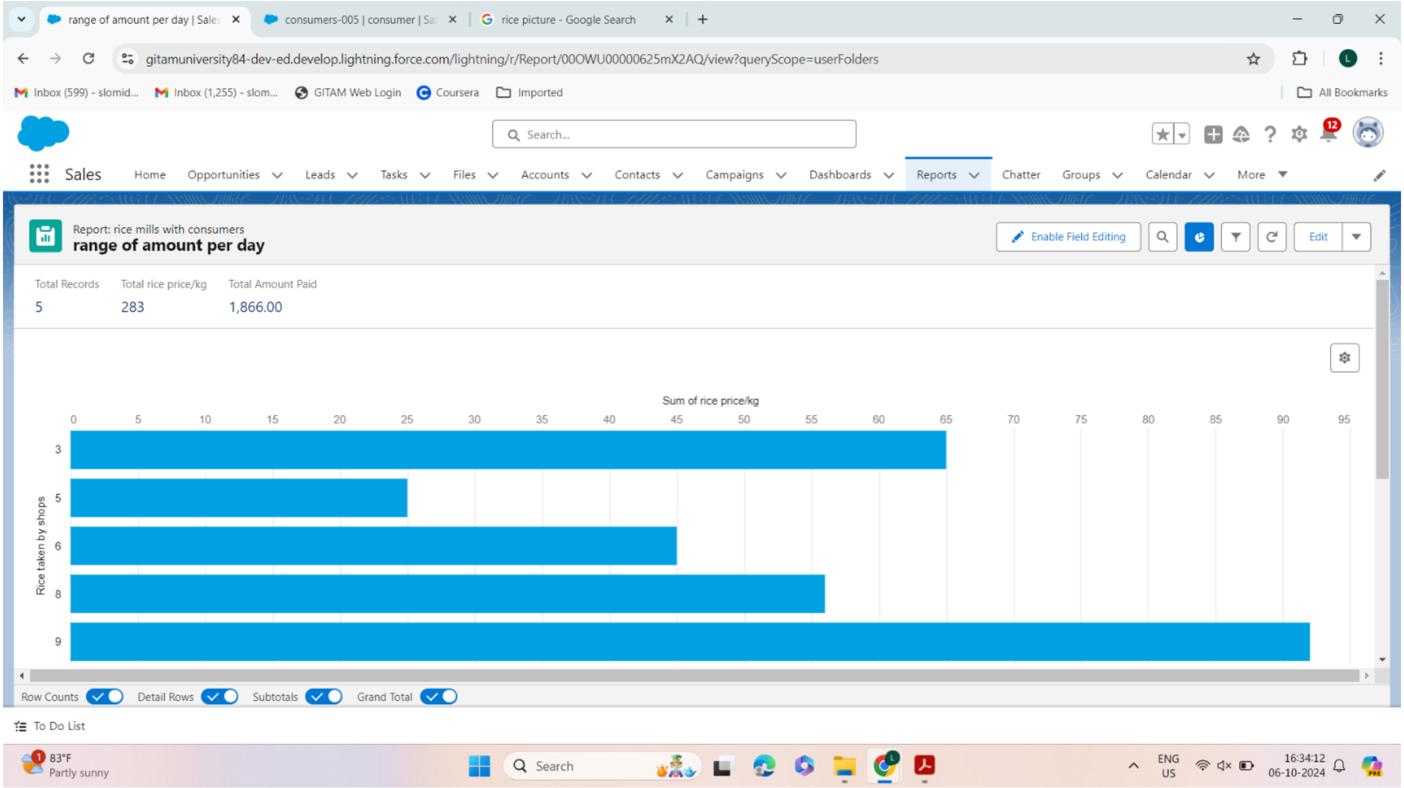
Creating an Apex Trigger

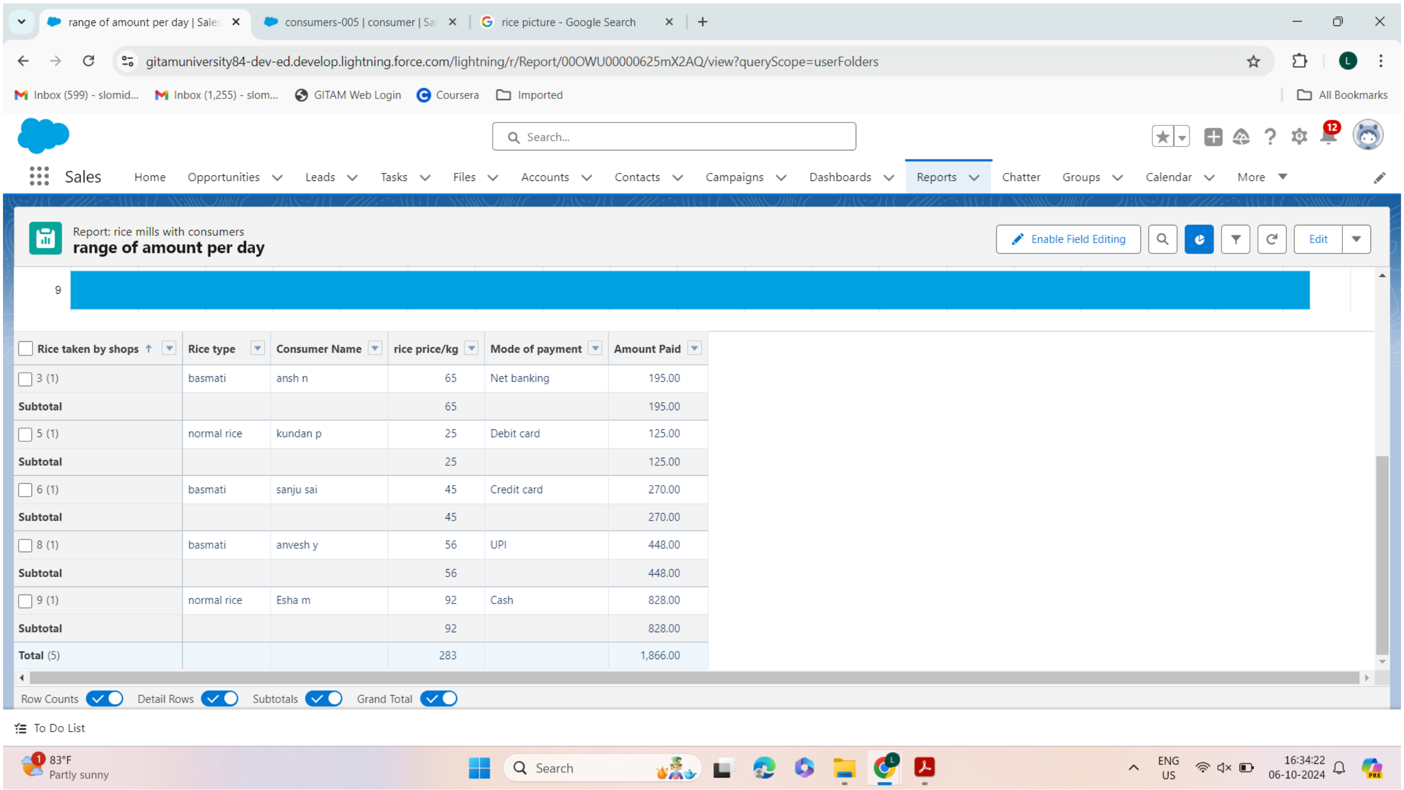
How to create a new trigger :

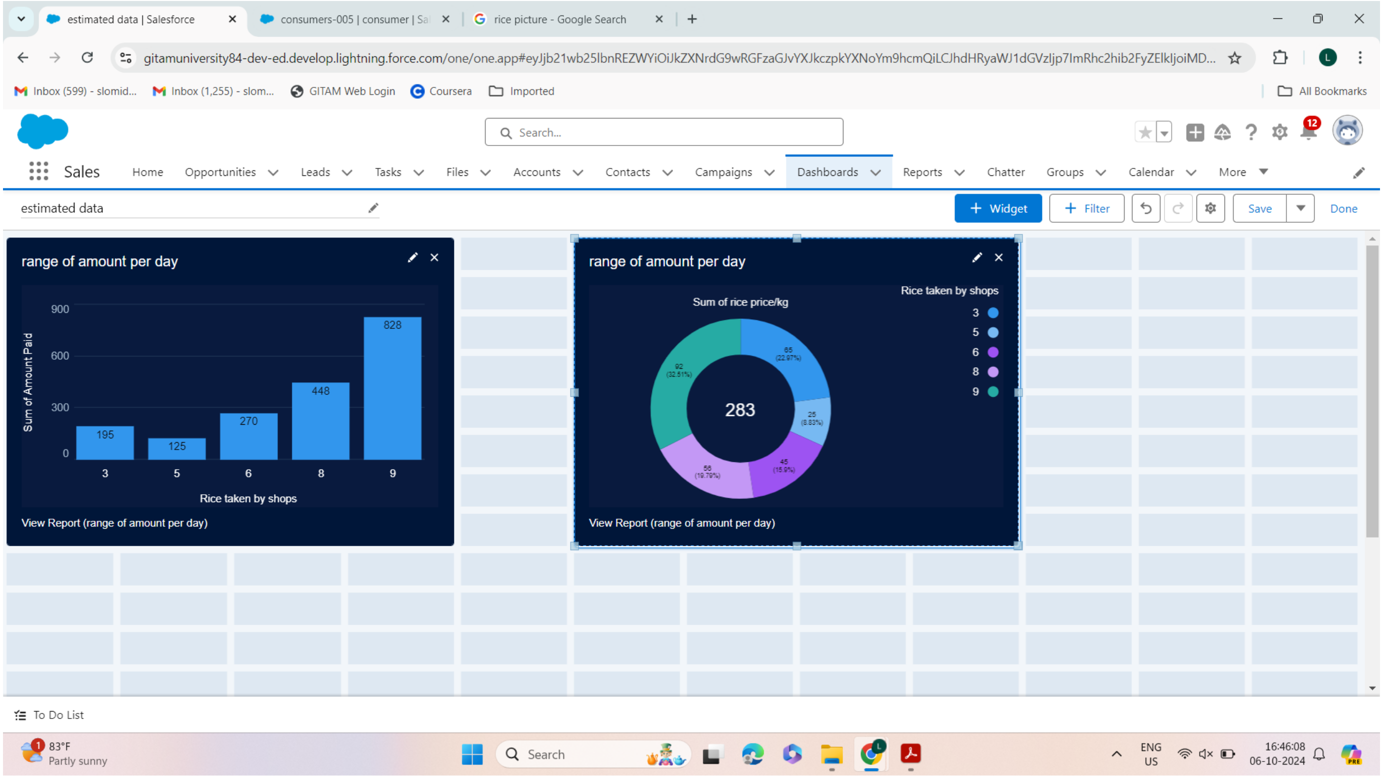
While still in the trailhead account, navigate to the gear icon in the top right corner.

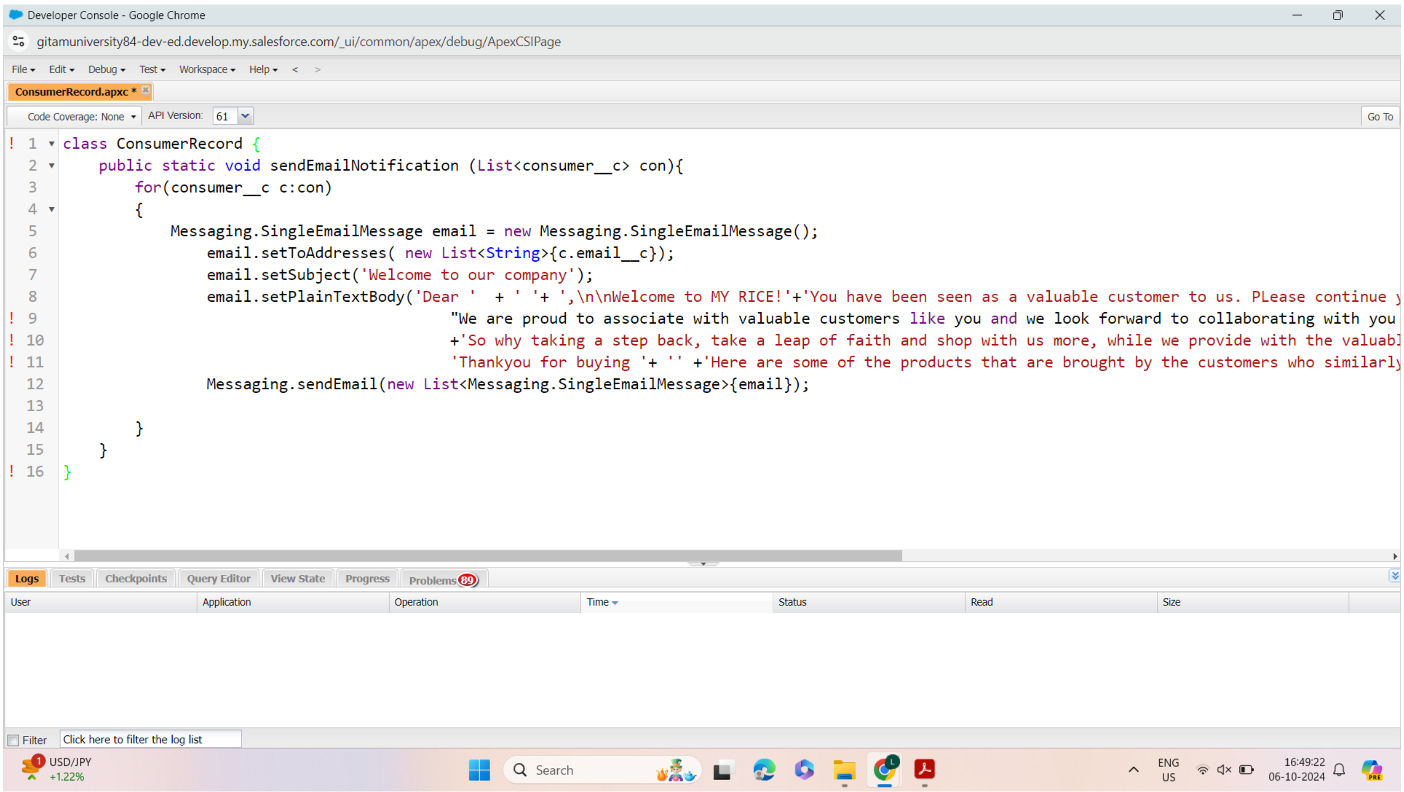
Click on developer console and you will be navigated to a new console window.

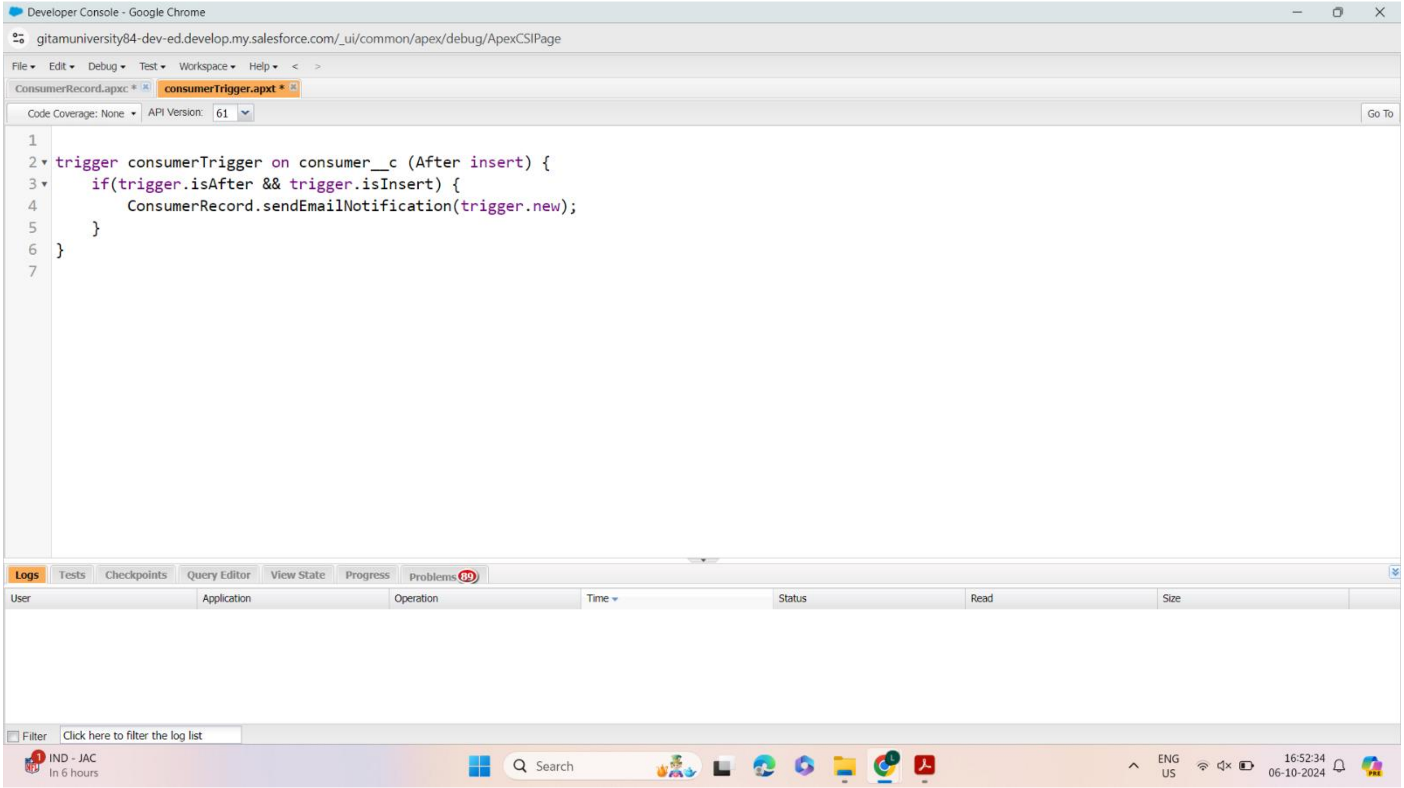
Results:


range of amount per day | Sales
gitamuniversity84-dev-ed.develop.lightning.force.com/lightning/r/Report/00OWU00000625mX2AQ/view?queryScope=userFolders
Report: rice mills with consumers
range of amount per day
Total Records 5
Total rice price/kg 283
Total Amount Paid 1,866.00
Sum of rice price/kg
Rice taken by shops
Row Counts
Detail Rows
Subtotals
Grand Total


Report: rice mills with consumers
range of amount per day
Rice taken by shops | Rice type | Consumer Name | rice price/kg | Mode of payment | Amount Paid
3 (1) | basmati | ansh n | 65 | Net banking | 195.00
Subtotal | 65 | 195.00
5 (1) | normal rice | kundan p | 25 | Debit card | 125.00
Subtotal | 25 | 125.00
6 (1) | basmati | sanju sai | 45 | Credit card | 270.00
Subtotal | 45 | 270.00
8 (1) | basmati | anvesh y | 56 | UPI | 448.00
Subtotal | 56 | 448.00
9 (1) | normal rice | Esha m | 92 | Cash | 828.00
Subtotal | 92 | 828.00
Total (5) | 283 | 1,866.00


estimated data | Salesforce
consumers-005 | consumer | Sa
rice picture - Google Search
Sales
Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar More
estimated data
Widget
Filter
Save
Done
range of amount per day
Sum of Amount Paid
Rice taken by shops
View Report (range of amount per day)
range of amount per day
Sum of rice price/kg
Rice taken by shops
283
View Report (range of amount per day)
To Do List
83°F
Partly sunny
Search
16:46:08
06-10-2024


Developer Console - Google Chrome
gitamuniversity84-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage
File Edit Debug Test Workspace Help
ConsumerRecord.apxc *
Code Coverage: None
API Version: 61
class ConsumerRecord {
public static void sendEmailNotification (List<consumer__c> con){
for(consumer__c c:con)
{
Messaging.SingleEmailMessage email = new Messaging.SingleEmailMessage();
email.setToAddresses(new List<String>{c.email__c});
email.setSubject('Welcome to our company');
email.setPlainTextBody('Dear ' + ' '+ ',\n\nWelcome to MY RICE!'+'You have been seen as a valuable customer to us. PLease continue y
"We are proud to associate with valuable customers like you and we look forward to collaborating with you
+'So why taking a step back, take a leap of faith and shop with us more, while we provide with the valuabl
'Thankyou for buying '+ '' +'Here are some of the products that are brought by the customers who similarly
Messaging.sendEmail(new List<Messaging.SingleEmailMessage>{email});
}
}
}
Logs Tests Checkpoints Query Editor View State Progress Problems
User Application Operation Time Status Read Size
Filter Click here to filter the log list
USD/JPY
+1.22%
Search
16:49:22
06-10-2024



These are the results and outputs which I have got for this Crm Application for wholesale rice mill.